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MARKETING & MEDIA DECISIONS

SPECIAL REPORT: MARKETING/ PROMOTION

OCTOBER 1987 • $4.00

'TWEEN POWER

Marketers discover there's nothing childlike about 9–15 year olds' buying capacity.

711 OD161861 41 93 5-DIGIT 20814
GREG CHRIS
CONGRESSIONAL INF SVC
4520 EAST-WEST HWY #800
BETHESDA MD 20814 DIR

Sony's Yutaka Sato is sending a message to Chris Metze and friends with a tween-specific line of products.

MEDIA FOR HIRE • NEWSPAPERS: THE LONG WEEKEND • TV REP REVIEW

MARKETING & MEDIA DECISIONS

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TWEEN

YOUTH'S MIDDLE TIER

They can't be made to stop slamming the refrigerator door, but they can program a computer. They are concerned about nuclear war but will drop everything when Pee Wee Herman's show comes on. They see tiger-striped, high-top sneakers as the height of fashion yet tell researchers they'd never choose a bank by virtue of its promotional gifts — only for its interest rates.

These eclectic tastes can belong to only one set — the hard-to-describe "tween" market. Generally, this is the group between the ages of nine to 15 that previously had been lumped in with the equally tough-to-figure children's market or the teen tier. But in today's far more complicated world, this nine-to-15-year-old segment has

Age aside, there's no in-between about them. These younger folk control some big dollars — big enough, in fact, for marketers to design product lines just for them.

POWER COMES OF AGE

by Carol Hall

distinct characteristics and powers all its own.

The salute is starting to come from all sorts of companies. Marketers from Jordache to Borden to Hallmark Cards to Kellogg to General Electric and Sony are busy developing or recasting products specifically centered on this age group.

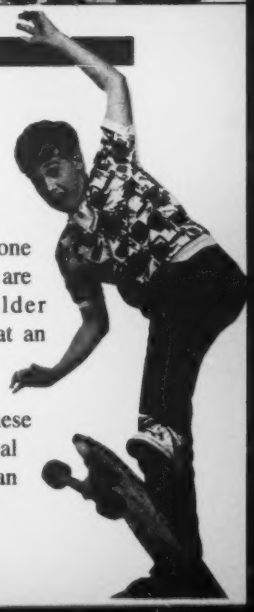
The reasons why are simple. As Ann Clurman, senior vice president of Yankelovich Clancy Shulman puts it, "Children are consumers-in-training." For many, though, it's a case of learning on the job. Estimates says tweens have at least $4 billion and possibly as much as $30 billion of their own pocket money. They also cast the swing vote on a wide range of family products, influencing the spending of another $40 billion. "You could almost start a kids' bank," jokes Watts Wacker, a senior vice president at Yankelovich, which recently completed a study of kids five-to-16 years old that focused on their family life and spending patterns.

What makes these numbers even more eyepopping is that there are fewer tweens now than there were in 1980. Roughly, there are 34 million kids spanning the six-to-15-year-old category. Though that number has been declining for about 10 years, mainly due to couples deciding to have fewer children, it is projected to rise to 39 million by the year 2000.

Teenage Research Unlimited, based in Lake Forest, Ill., divvies tween spending clout into five categories. There is the money they spend on themselves; the money parents spend on them; the money they shop for the family with; the influence they have over family purchases; and the money they will spend in the future as full-fledged teenagers and adults.

The latter is a key point, since for lots of these tweens the future is now. Lifestyles have changed markedly since the days of *Ozzie and Harriet*, and these kids have money and responsibility. With 75% of all moms at work, and more and more broken marriages, kids are left alone more than before and are being asked to shoulder more household duties at an earlier age. "We're always saying kids are growing up faster these days, but sociological trends are making that an

LARRY HAMILL/BLACKSTAR



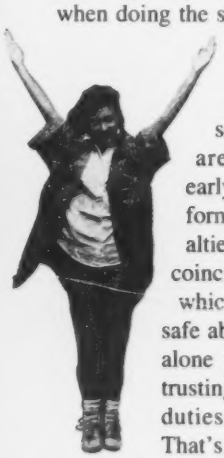
Borden designed Spirals with tweens in mind, says Abernathy.

TWEEN PHOTOS BY STEVEN BEGLEITER

actuality," says Dr. Selina Guber, president of Children's Market Research in New York.

With kids doing more family shopping — a Teenage Research poll found 61% of 12-to-15 year olds buy groceries — they are having to make brand-purchase decisions. That's food for thought for a wide variety of companies. General Mills, for instance, is reportedly recasting a product to go after this segment, and the National Dairy Board is currently testing two milk commercials in Arizona and Tennessee that target tweens. If all goes as hoped, the board will unveil an $8 million effort aimed at this group.

But Kellogg Co. has already beaten them to the punch. Last March, it brought out Pro Grain, a honey-toasted cereal that, to reach a 13-year-old muncher, is advertised on weekday and weekend daytime kids' shows. "We've seen a lot of research that says they [the tween group] are doing a lot of the housework and grocery shopping," says a Kellogg spokesperson. Indeed, Yankelovich's study reports 53% of kids say they have different brand preferences than their parents and frequently buy the brands they like when doing the shopping.



Youth-market researchers believe kids are often "branded" early — that is, they've formed some brand loyalties by age nine. (That, coincidentally, is the age at which mothers start to feel safe about leaving the child alone after school and entrusting them with shopping duties, say researchers.) That's why it is more important than ever for marketers to plant the first seeds of brand loyalty at an early age.

"A lot of kids don't know about Sony today," says Yutaka Sato, director of consumer audio at Sony, "but if we can provide them with quality products, they will remember S-O-N-Y in the future." That's why Sony, which is trying hard to expand its share of the U.S. consumer-electronics market, is launching the My First Sony line of four audio products for kids this month. The walkie/talkie, "boom box" portable stereo, Walkman-like cassette player and a sing-along tape player with microphone are priced from $35 to $60.

All are brightly colored, "rubberized" to make them kid proof and easy to operate. Inside, though, is the same Sony technology as in the adult models. Distribution will be quite different from the usual, however. While existing Sony dealers will offer the products, specialists like Toys "R" Us, Child World and F.A.O. Schwarz will also carry the items. Department stores are also on the must-carry list.

Sony developed the line at the instigation of its salesforce, which kept seeing *toy* electronic products at trade shows. Indeed, toymaker Fisher Price is selling a $60 cassette player/radio. Sony figured there was a market opportunity, as these products may not have the greatest sound quality and are made by a toy company—a genealogy anathema to a child of a certain age.

Also, Sony research showed that kids were asking to use their parents' audio equipment. Since parents are reluctant to lend expensive things to their kids, Sony reasoned a cheaper, look-alike model might win favor. Focus groups bore out Sony's gut instincts — they learned that 90% of the parents had bought their kids toy audio equipment.

Sony doesn't say so, but they were probably also motivated to mine this market because General Electric is gingerly moving in. Last year, GE introduced the Side Step, a more fashionable, colorful version of the "boom box." Four more products were added this past April: the Watch Out (a portable audio/video system); Onestep (portable tape player); Jammer (clock radio); and Half Step (Walkman-like). All are priced in the $30-to-$60 range and boast features like a self-winder mechanism to store ear phones that GE thinks kids will find irresistible. The company declined to give sales results, claiming it's too early for any meaningful numbers.

KIDS AS CONSUMERS

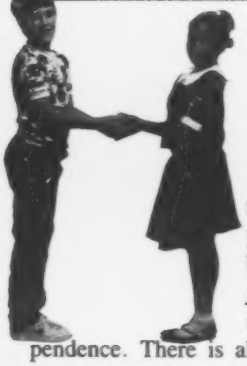
PERSONAL PURCHASES IN PAST 2-3 WEEKS	9-15 Year Olds (606)
Candy, Gum	71%
Snack Foods	39
Fast Food	37
Records, Tapes, CDs	27
Greeting Cards	19
Books	17
Jewelry/Watches	16

PURCHASE BY SELF WITH PARENTS	9-15 Year Olds (606)
Sneakers/Gym Shoes	85%
Clothes	83
School Supplies	72

CHILD-REPORTED PURCHASE INFLUENCE	6-15 Year Olds (1,175)
Apparel	85%
Breakfast Cereal	68
Ice-cream	62
Toys	61
Soft Drinks	60
Video Movies	51
Radio	38
Bread	29
Toothpaste	28
TV Set	19
Car	19
VCR	13
PC	12
CD Player	5

Source: Nickelodeon/USA Today/ Yankelovich Youth Monitor, 1987.

DAVE FLAHERTY



aving products to sell is only half the battle. This age range is a harder group to attract than even young children, because they are just developing ideas of independence. There is also not a lot of targeted media designed with this age span in mind (see sidebar, page 58). A too kid-like approach turns off the kids, while an adult pitch may offend the parents.

Advertisers seem to be taking one of three tacks in trying to reach them. Some, such as GE, are pitching directly to the tween group. Starting in September, ads began to run in *Teen, Seventeen, Young Miss, Scholastic, Junior Scholastic* and *Splice* magazines. Others, such as Borden and the fast-food and soft-drink marketers, are targeting both the kids and their parents. Still others, such as Sony, are advertising their products first to Mom and Dad and then turning to the kids.

This year, Sony will spend about $3 million on television and print ads for its new line of kid products. The ads, to be directed at parents, will nevertheless use kids as their stars. The tv spots, which allow for dealer tags, feature a chorus of kids singing the jingle, "I like Billy, I like Tony, but what I really like is My First Sony . . ."

The ads, placed by McCann-Erickson, will be split between daytime dramas and prime-time shows. Print placements go after parents, too, with buys in books such as *McCall's, People, Good Housekeeping, Working Mother* and *Family Circle*. "The logic," says a company spokesperson, "is that by the time the kid says 'I want it,' the parents have gotten the message that this is good, it's okay."

That's sort of the approach Borden is taking with Spirals, its first-ever snack product aimed at kids 12 and up. "We are trying to appeal to the end-user but with an eye to the gatekeeper," says Chris Abernathy, vice president of marketing for Borden in explaining how he wants to win over kids — and Mom — to the new Spirals snack. Borden decided to go after this audience when research showed they chomped more of these kinds of foods than any other group. "The tonnage is just incredible," says Abernathy, laughing.

To get a little piece of that for Spirals, a corkscrew-shaped corn-and-tortilla crunchy, Borden designed a flashy, tween-tuned package.

GETTING THEIR ATTENTION

Tweens are a notoriously mercurial bunch when it comes to media consumption. At this age they behave more like accordians than people, their media tastes stretching to things that target kids as well as those designed for teens or adults.

Take magazines, for instance. The range of kid options is wide, and for a given product the whole gamut could be appropriate for the tweens you want to reach. There are books for the younger end of the scale, like *Barbie* magazine. For the 8-to-14 year-olds, there are pubs like science-oriented *3-2-1 Contact*. Slightly older kids might go for the classics — *Junior Scholastic, Boy's Life, YM* or *Teen*. Some new ones are coming in as well, like *Splice*, the new book on young movie stars and rock luminaries, and *Sassy*, due in March, which will cover fashion, entertainment and health.

Since tweens like to read the big kids' magazines, books like *Seventeen, Glamour, Mademoiselle* and even *Cosmopolitan* could be considered. And young boys are no strangers to the pages of *GQ* — Jordache advertises its tween-targeted jeans there.

On the tube, while a number of shows target tweens — among them NBC's *Main Street* and CBS's *Pee Wee's Playhouse* — most of those air in slots like Saturday morning and weekday early fringe.

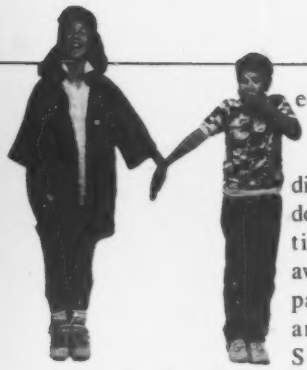
NBC's program guide and General Mills' learning kit.

But the networks' ratings for 6-to-11 year olds (as close as they come to measuring tweens), tell a different tale. Eight of the top-ten shows kids watch are in prime time. They include sitcoms like *Family Ties* and *Alf*, as well as shows like *The Disney Sunday Movie*. Two Saturday-morning cartoon shows are in the top-ten for this age group, and *Pee Wee* ranks 15th.

Another element in the tween tv mix is the popular kid cable network Nickelodeon. Begun in 1979, the network began accepting advertising in 1984. Nickelodeon is on-air with kid's programing 14 hours a day and targets 6-to-15 year olds.

The degree of tween media consumption is also hard to measure. Though their medium of choice is most often television, they still tend to watch far less than adults. You're not always sure of catching them, in other words, on a given day or even in a given week.

And there's no real consensus on how effective a vehicle print is for tweens. Nay-sayers claim they don't sit still long enough to read the editorial parts of a magazine, much less the ads. But others argue that kids this age are actually a better print audience than adults. The logic here is that grown-ups have not only perfected the art of skimming but have already had years of ad exposure and are jaded.



edia buys include youth-oriented radio (with Madonna concert-ticket give-aways), newspaper inserts and spot tv. Summer tv buys put 30-second spots in heavy kid-watching dayparts: soap operas and early-fringe shows. The ads, which feature kids spiraling into the air to a rock beat, have also begun to air on MTV in Chicago. Moms will be courted through continuing use of afternoon soaps and point-of-sale promos and sampling. By the time the chips are national in late December, about $10 million in ad monies will have been spent.

On the whole, companies are not spending vast amounts to reach this audience. For one thing, it costs less to advertise to this group, especially on television, since their favorite dayparts are generally cheaper to buy than the adults'. In addition, marketers are still being conservative in their spending against this group, because while their influence has grown tremendously, they are still not the main purchasers in most product categories.

Also, everyone has a different age definition of what makes a tween. Some put the entry age at six, but most put it at nine. Nearly all agree, though, that the cutoff is 16, the magic age of driver's licenses and the call to other kinds of teen action.

Tweens actually exist in some kind of twilight zone — too sophisticated for babyish things and still too naive to be trusted with the older teens' freedom. They are also at that finicky stage where something is great one day and totally gross the next. Yet they are a better-educated and more worldly group than ever before — regardless of socio-economic background. In general, they are better informed about sex, politics and technology, for instance, than previous generations.

It's perhaps television, of which tweens are avid watchers, that serves most to make them a lot more aware — and attuned to what products are in the market. According to the Yankelovich poll, watching tv is how 88% of its respondents spend their after-school time. In that same poll, 45% report having their own tv set.

There are other reasons why baby-boomer offspring are a market force to be reckoned with. Parental guilt, believe it or not, ranks high. The angst both single parents and dual-career parents feel about spending less time with

Direct mail is an approach more marketers are looking at for tweens. In the past, it's use has been restricted to magazine-subscription offerings. Most still address kid-oriented mailings to parents, because Mom and Dad still have the biggest buying clout and many don't want their kids solicited by mail.

Don't forget there are more opportunities for direct marketing than just the mail. What if an advertiser could penetrate that bastion of tween-dom, the school room?

Lifetime Learning Systems (LLS) was formed ten years ago to do just that. The Fairfield, Conn., company creates and distributes corporate-sponsored teaching programs to classrooms, from pre-school through college. Marketers can target any grade and age range they choose and, adds founder Roberta Nusim, a former school teacher, "they can target without any competition."

Even a partial list of participating companies and organizations reads like a business who's who: American Express, Adidas, Ace Hardware, Bic, Lever Brothers, General Foods, Columbia Pictures, American Paper, Beatrice, Hallmark, Johnson & Johnson. A sponsor pays for the development of a program and all the materials students need for it. Sponsors spend anywhere from $20,000 to $500,000 on a lesson plan. The programs allow a company to advertise to students as long as there is an educational tie-in.

In one example, Universal Studios sponsored a teaching unit to tie into its launch of the *Breakfast Club*, a tween/teen movie. Students at the more than 12,000 schools the lesson plans went to weren't shown the film and weren't required to see it. Instead, the program revolved around teacher-led discussions about topics alluded to in the film: peer pressure, relationships with parents and siblings, feelings of rebellion. The thinking was that kids involved in discussions would rush out to see the film. According to a follow-up study, 37% of those exposed to the kits did take in the movie, as compared to 22% of kids who hadn't been primed.

American Express is soon to launch a kit for elementary school kids with a far-reaching program teachers can pick and choose from. The program is tied to the bicentennial of the Constitution and is geared to interesting kids in U.S. history and in traveling to other parts of the country. One plan has kids making a class constitution, and another has them planning an imaginary cross-country trip. The only obvious plug for Amex is the "traveler's certificate" in each kit, which is an award for completed course work that bears the traveler's check logo.

their children results in their spending more money on the kids.

Today's tweens also don't operate under the same ethos as their 1960s-nurtured parents. Sixties tweens dreamed of driving VWs; today, it's BMWs. "There is no '60s social-value thing today," says Dr. Steve Barnett, chairman of Research & Forecasts, a research and communications consulting firm. "So today, there is no reason not to spend to the last penny."

And tweens have more dollars to spend these days, in part because allowances are heftier. Also, a fair number have part-time jobs. According to a 1986 Teenage Research Unlimited survey of over 2,000 kids ages 12-to-15, boys collected $22.40 a week on average, while girls got $15.40.

In deference to fatter tween wallets, marketers have moved their idea of acceptable price points higher. "It used to be if an item retailed for $5, you pitched to the kid. If it was $20, you went to the parent," claims Allen Bohbot, president of Bohbot & Cohn Advertising, a media buying service that specializes in advertising to children. "Now," he states, "it can even be $100 and you'll go to the child."

Still, most products that include tweens in their marketing plans carry pretty light price tags. Sony's $3 Music Pops blank tapes for kids — they come in colorful packages with easy-to-understand instructions — are a good example. So is the "single" compact disc they are pushing the recording industry to accept. The smaller CD would feature two songs, just like a 45 vinyl single, and it would be aimed primarily at tweens, the biggest buyers of 45s, and be priced at about $4. It would, says Sony, get them accustomed to using a disc player as well as to the sound quality of a CD.

Hallmark has also gone the inexpensive route with its new line of school and clothing accessories. The company was looking to add to its traditional customer base, mothers and young women, when it rolled out Color Gear late in the summer of 1986. Then, the line consisted of decorated notebooks and other school accessories. But it did so well with the target group of preteens to young adults — emphasis on the lower end — that it was expanded this summer.

JUDY GUROVITZ

Taylor of Jordache discovered his market had become younger.

"Until recently, Hallmark didn't address this segment," notes Barbara Miller, product-information coordinator. "We haven't had the teen consumer coming into the store — this is a first for Hallmark." The line now consists of clothing accessories like sweatshirts, sunglasses, scarves and earrings, as well as school accessories. Color Gear also features wallets, backpacks and tote bags.

The whole line is essentially an elaborate back-to-school promotion and was only available from mid-June through September. Hallmark plans to repeat it again next year. Advertising is print only and is in youth-targeted books like *Splice*, *Teen*, *Young Miss* and *Mademoiselle*.

All agree that the current effort to reach tweens could be just the beginning, despite the fact that marketers have been a bit slow to see this group move into view. "They're behind the times," observes Selina Guber, who says requests coming into her company for info on kids 9-14 have picked up dramatically over the last year.

Advertisers have been known to be a bit backward in their efforts to get chummy with kids — and kids can be harsh critics of advertising directed at them. As much as they despise being talked down to, for instance, they *hate* it when adults use their lingo. "Even if a word's 'in,' " cautions Marshall Cohen, senior vice president/research and corporate services at MTV, "kids may resent your using that word, because they know who make most commercials — adults."

Jordache seems to have the problem licked. Last year, the jeans company broke a campaign with good kid copy — though parents hated it. Ads began with lines like, "Have you ever seen your parents naked?" and "I hate my mother. She's so much prettier than I am."

Where did the company learn to talk like that? They picked it up from kids in focus groups and wrote it into ads for their jeans and other clothing lines. Then they hired kids to say it on tv, so that out of the mouths of babes comes a message other kids will respond to. Though the company won't share the figures, those in the industry say sales took off with the release of these ads in the 1986-87 campaign. "We're advertising *from* the group, instead of *to* it," asserts Jerry Taylor, director of advertising. He has bought space in *Seventeen*, *Teen*, *Mademoiselle* and *Rolling Stone*. Television spots tend to favor prime-time sitcoms, such as *The Cosby Show* or *Family Ties*, as well as after-school features.

Jordache began revamping its marketing strategy about three years ago, says Taylor, when it realized its average customer was no longer the 25-year-old woman, but boys and girls as young as 12. Now, notes Tayor, who could be speaking for a host of marketers, "My customers are kids who can walk into a store with either their own money or their mother's. The dependent days of tugging on Mom or Dad's sleeve in the store are over." ■

NEW DIRECTIONS

Changes in the media world have helped direct marketing clean up its image and grow more specialized.

by Paula Schnorbus

Specialized catalogs transformed into spiffy videologs . . . television home-shopping channels that sell everything you can imagine . . . data bases that tell what brand of tomato sauce Mrs. Jones favors. These are only a few of the most significant ways that direct marketing is becoming a trendy and sophisticated field.

The common thread throughout the $12 billion industry is the search to make direct-marketing more efficient — and, in the process, clean up its image among consumers tired of junk mail and dinnertime phone calls from over-eager salespeople.

Catalogs, for instance, are seeking to broaden their appeal by becoming more specialized and by squeezing themselves onto newsstands and kiosks. Some catalogs are turning themselves into videotapes or videologs. Others have started to take advertising to offset costs, though the jury is still out on whether these ads are distracting to mail-order buyers.

Lists are getting more targeted too, because of the struggle to eliminate "irrelevent or junk mail," points out Raymond Dempsey, chairman of AdDirect, a Westport, Conn.-based division of Marketing Corp. of America.

One of the biggest breakthroughs in

DIRECT MARKETING MEDIA EXPENDITURE ESTIMATES (millions)

	1986	1985	% Gain/loss
Catalogs	$2,538	$2,254	13%
Direct Mail (includes brochures, card decks, bill statement enclosures, package inserts etc.)	2,214	1,840	20%
Telemarketing*	162	336	NC
TV (cable, network, local and interactive)	216	92	135%
Radio	54	NA	–
Magazines (space or inserts)	324	230	41%
Newspapers (space or inserts)	108	138	–22%
Yellow Pages**	6,000	NA	–
Outdoor***	128	122	5%
Total	11,744	5,012	NC

Sources: Direct Marketing Association projections.
Total sample: 1,173 (1986); 1,196 (1985).
Response rate: 36% (1986); 32% (1985).
Sample doesn't include financial service or insurance companies; nonprofit organizations or fundraising direct response ads.
* Includes outbound and inbound in 1985 and outbound only in 1986.
** *Direct Marketing* magazine.
*** Institute of Outdoor Advertising. Includes toll-free and local telephone numbers only.
NA – Not available
NC – Not comparable

the industry is the emergence of television's home shopping. With its easy access to the nation's households, the medium is highly regarded as an economical way of distributing and promoting merchandise. "It is probably one of the most efficient direct-marketing mediums ever devised," says Larry Gerbrandt, a senior analyst at Paul Kagan Associates Inc.

The following is a sketch of the many methods direct marketers use to deliver their sales messages and an examination of the trends in each.

Direct mail: Targeting is catching on in a big way. Marketing supply houses offer lists of everyone from Hispanics to expectant mothers for cost-conscious direct mailers. The type of advertisers using this medium, in addition, is getting more worldly. Add airline tickets and financial services to the host of products and services sold through the mail today.

The changes should improve consumers' reactions to direct-mail pitches. Currently, about 35% of the letters go right in the trash, according to direct-marketing consultant Joe Morrone. And response rates are staying in the dismal range — at about 2%, according to Donn Rappaport, chairman of American List Counsel.

That hasn't deterred direct mailers, however. One of the options picking up speed is magazines mailed to subscribers in a polywrap. The magazines arrive with such extras as renewal notices, outside catalogs and ads.

Another dark spot on the horizon, however, is the threat that mail-order houses will be forced to decrease their mailings because of increasing paper and postage costs. Possible taxes on mail-order purchases remains an issue for buyers and sellers alike too. But Maxwell Sroge, a mail-order expert, doesn't believe a levy will be passed during the upcoming election year.

The intensifying number of scams in direct mail is also irksome, says Denison Hatch, editor and publisher of the newsletter *Who's Mailing What!*. One popular current scam is vacation clubs that go bankrupt after rolling in high fees for memberships.

Editor Hatch

Expert Sroge

On the catalog front, the news is decidedly optimistic. A recent survey by Marke/Sroge Communications indicates that 20 of the leading mail-order-catalog companies say they will be sending out more catalogs for the Christmas season and are anticipating a sales increase of 12% to 15%. Additionally, as of 1986, there were 6,000 different types of catalogs, up 25% from five years earlier, when there were 4,500, according to Marke/Sroge.

Telephone: One of the troublesome signs here is the growing regulatory outcry against telemarketing. In fact, telemarketers will be disconnected this month in Florida homes that put a special notation in the phonebook to keep away unwanted "sales solicitation." Meanwhile, the Direct Marketing Association has set up its own Telephone Preference Service, which allows customers to remove their names from outbound telemarketing lists.

Television home-shopping shows are probably one of the most efficient direct-marketing mediums ever invented.

Consumer inbound calls are growing at a fast rate, says Geri Gantman, chairwoman of the Telephone Marketing Council of the DMA. This rise is due to more women working and an increasing number of senior citizens who are immobile, she says.

In addition, says Phyllis Guest, owner and manager of Copy/Write, a marketing-communications consultation service, telemarketing is "no longer just a sales function." Free samples are made known to the public by tv commercials that carry "800" numbers. New list prospects can be developed from the calls generated.

Interactive tv: Videotex, which uses home computers, has had a rough start since its beginnings 10 years ago. It has been plagued by programs that are "user surly" rather than user friendly, says Gary Arlen, president of Arlen Communications Inc., which publishes *Electronic Shopping News*.

He notes that after failures such as Knight-Ridder's Viewtron and Times-Mirror's Gateway, videotex was referred to almost like a dirty word. H&R Block's CompuServe is considered more viable than these two projects, however. That's chiefly because the electronic shopping mall avoids costly

news programing — which shoppers don't want anyway.

Two other operations are scheduled to debut in the next year: Trintex, a joint videotex venture of Sears and IBM, and Telaction, a consumer-controlled tv shopping service in Chicago from J.C. Penney.

Broadcast: The shift for hybrid commercials, which combine image advertising with "800" numbers, is to shorter spots, says Robert Georgalas, vice president, media director of JWT Direct. Instead of the typical 120-second spot, he notes 30-second plugs, such as for the *Wall Street Journal*, are getting popular.

In cable, of course the big news is tv shopping shows. The sales leaders (who probably even hawk kitchen sinks now) continue to be Home Shopping Network, QVC Network and Cable Value Network. Look, however, for increasingly specialized networks like the Fashion Channel, which has originated from multiple-system operators.

The cable industry got more good news last year in a study by Media Buying Associates, which found cable is more effective than broadcast for generating direct-response purchases. But direct-marketing business on cable has been dropping off, because much of the time is being nabbed by bargain-hunting general advertisers, says Jim Springer, a partner of Ellentuck & Springer Inc., a direct-response broadcast agency.

Radio, says Springer, is still reluctant to sell a two-minute commercial, the standard length for direct-response advertising. But direct marketers may get a more positive impact from radio spots as news departments are built up, he indicates. The news will draw more listeners and hopefully shoppers, he reasons.

Newspapers: Direct-response coupons are proliferating in travel sections and, especially, in finance, hospital and health sections in newspapers, says Alfred Eisenpreis, senior vice president, retail marketing at the Newspaper Advertising Bureau. And, says Eisenpreis, newspaper supplements that carry toll-free numbers or coupons are increasingly a favored direct-marketing tool.

One of the more innovative uses of direct response in newspapers comes from Harrod's department store in London. The upscale retailer runs an "800" number in newspapers here to announce its major sales.

Magazines: Mail-order sections are getting more plentiful as an efficient way to get low-cost leads, says Robert Coolidge, media director at Marcoa DR Group, Chicago.

Stan Rapp, chairman of Rapp & Collins U.S.A., adds that the automotive industry is dipping into direct response in magazines. Ads for Lincoln-Mercury's Merkur have included a toll-free number for interested car buyers to request a data disk. More recently, the diskette has been advertised through direct mail.

Agencyman Springer

The development of Selectronics will mean greater targeting capability for mail-order advertisers in magazines. Selectronics allows ads and editorial to be personalized for readers. Dale Smith, president of *Farm Journal*, boasts that in May 1984, nearly 9,000 different versions of one issue were distributed.

On another front, mail-order sections in farming magazines remain prosperous, according to Jim Cornick, publisher of *Successful Farming*. He explains that farm machinery dealers have been consolidating, forcing farmers to shop farther away and apparently through mail order.

Outdoor: Here the trend is toward more creative uses of this medium. National advertisers have grown fond of mnemonic devices, such as Emery Air Freight's billboard, which is painted like a giant brown package with the number 1-800-Hi-Emery emblazoned across it.

Outdoor is perceived as an inexpensive way of constructing a direct-response campaign, and sometimes it is considered too effective. Take the case of Adventists Health Systems, which ran a series of ads for nurses, such as "Need a doctor? Call a nurse." The toll-free number plastered on the billboard received so many calls that the health system cancelled the billboard campaign, says Gannett Outdoor.

Yellow pages: The books have been diversifying since the AT&T divestiture, when the 19 regional phone companies printed 5,600 directories. Today, some 200 independent publishers are compiling as many as 7,000 directories, including silver pages for the over-55 market, tourist and neighborhood directories and even Chinese and Portuguese directories. In addition, "talking" phonebooks, which allow consumers to listen to recorded ads, debuted in Boston a year ago.

Advertisers confused by the new options should welcome a yellow-pages usage study due out next year. By the National Yellow Pages Agency Association, it will track which books a household keeps and what headings are referred to for product decisions. ■

BRAND REPORT

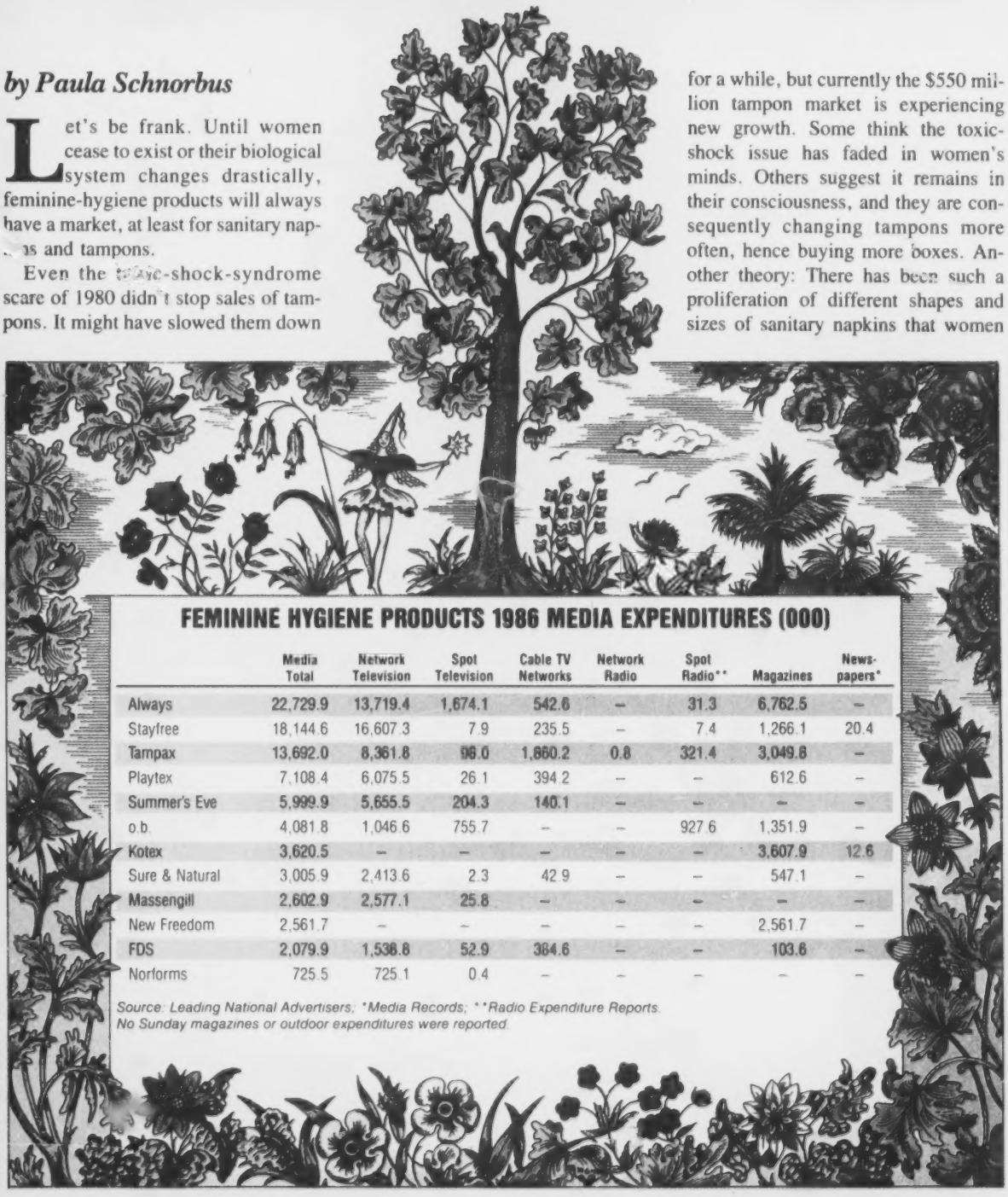
No. 146: Feminine-Hygiene Products

PERSONAL APPEAL

by Paula Schnorbus

Let's be frank. Until women cease to exist or their biological system changes drastically, feminine-hygiene products will always have a market, at least for sanitary napkins and tampons.

Even the toxic-shock-syndrome scare of 1980 didn't stop sales of tampons. It might have slowed them down for a while, but currently the $550 million tampon market is experiencing new growth. Some think the toxic-shock issue has faded in women's minds. Others suggest it remains in their consciousness, and they are consequently changing tampons more often, hence buying more boxes. Another theory: There has been such a proliferation of different shapes and sizes of sanitary napkins that women



FEMININE HYGIENE PRODUCTS 1986 MEDIA EXPENDITURES (000)

	Media Total	Network Television	Spot Television	Cable TV Networks	Network Radio	Spot Radio**	Magazines	Newspapers*
Always	22,729.9	13,719.4	1,674.1	542.6	–	31.3	6,762.5	–
Stayfree	18,144.6	16,607.3	7.9	235.5	–	7.4	1,266.1	20.4
Tampax	13,692.0	8,361.8	96.0	1,860.2	0.8	321.4	3,049.8	–
Playtex	7,108.4	6,075.5	26.1	394.2	–	–	612.6	–
Summer's Eve	5,999.9	5,655.5	204.3	140.1	–	–	–	–
o.b.	4,081.8	1,046.6	755.7	–	–	927.6	1,351.9	–
Kotex	3,620.5	–	–	–	–	–	3,607.9	12.6
Sure & Natural	3,005.9	2,413.6	2.3	42.9	–	–	547.1	–
Massengill	2,602.9	2,577.1	25.8	–	–	–	–	–
New Freedom	2,561.7	–	–	–	–	–	2,561.7	–
FDS	2,079.9	1,536.8	52.9	384.6	–	–	103.6	–
Norforms	725.5	725.1	0.4	–	–	–	–	–

*Source: Leading National Advertisers; *Media Records; **Radio Expenditure Reports. No Sunday magazines or outdoor expenditures were reported.*

ILLUSTRATION BY RODICA PRATO

became "confused" and turned to tampons, speculates Joseph Kozloff, vice president, Drexel Burnham Lambert Inc.

Indeed, there are pads for all ages and seasons. The $1 billion market includes short ones for teens; individually wrapped ones for discretion; hourglass-shaped pads to mesh with the contours of the female body; and even "manta rays," as Kozloff refers to them, or the "winged" ones for added protection.

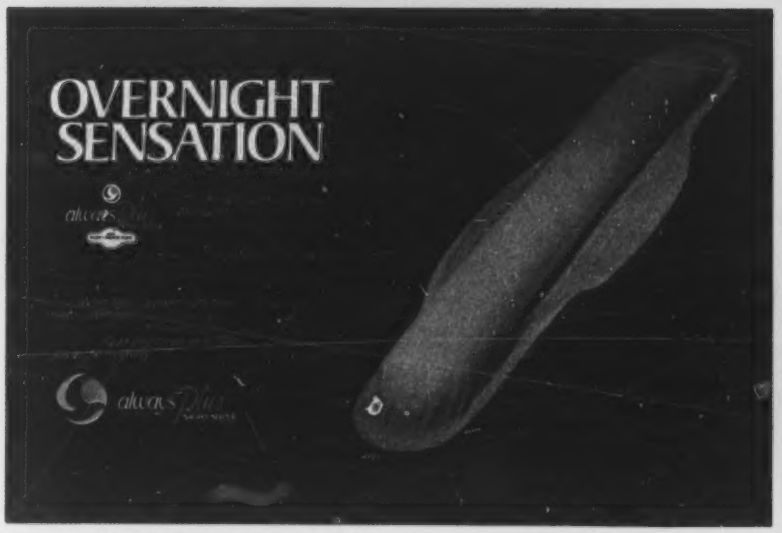
Stayfree had fastened itself to the top-pad position for years after, in 1969, it became the first adhesive-backed pad, a real breakthrough compared with the belts and pins previously needed for usage.

Just recently, however, Always, a line from Procter & Gamble Co., (P&G), pushed the Johnson & Johnson (J&J) Stayfree brand out of the lead in napkin-market share. P&G introduced Always about three years ago, but last year, the redesigned product with extra, adhesive-backed side panels (or "wings"), hit the crowded store shelves.

Ironically, it is a former Procter product, Rely tampons, that is most associated with toxic-shock syndrome. The brand was gaining market share with its popular super-absorbent styling, but then that same styling was linked to cases of toxic shock in 1980. Meanwhile, a recent study by the Centers for Disease Control has found that *any* brand of super-absorbent tampons may cause the greatest risk of toxic shock, and those women who use tampons of any kind have 33 times the risk of those who don't.

Undaunted by the Rely episode, Procter jumped into the sanitary-napkin arena and designed Always a few years later. With Procter's "aggressiveness," as Vicki Weber, assistant vice president at Merrill Lynch, calls it, Always catapulted itself to the number-one spot in feminine napkins.

Historically, as the market evolved, advertising for feminine-hygiene products was "hidden" in women's magazines. Even the packaging, when the products were first marketed in the 1920s, was plain wrapping, according to "The Feminine-Hygiene Products Market," a report by Packaged Facts Inc. Kotex, the first sanitary napkins, made their advertising debut in *Ladies' Home Journal* after the publisher's secretary told her boss it would be a "godsend" if the pads could be advertised.



Procter & Gamble's Always napkins now come with "wings."

It wasn't until almost 20 years ago that the National Association of Broadcasters relaxed its policy regarding feminine-hygiene advertising. FDS, the feminine deodorant, was the first to break tradition. It was followed by menstrual products and douches in the early 1970s. Now, tv is the most used medium for the products.

The NAB's codes of industry self-regulation were ruled unconstitutional by the Justice Department in 1982, but the networks continue to protect the viewing public from sanitary-protection commercials. Ads generally are only allowed during daytime soap operas and game shows, and not again until after 8:00 or 9:00 p.m., depending on the network. One study conducted in recent years by Tambrands Inc. found that the majority of Americans don't feel menstruation should be discussed openly. The networks claim they are even stricter than the NAB was in what they allow in a commercial.

Sanitary napkins were "hidden" in women's magazines until 1972. Now even the word "period" is allowed to be used on tv, but ads only air during certain hours.

Feminine-hygiene advertising is often *very* feminine, with hearts-and-flowers settings and women in ruffled dresses. More recently, when leotard-clad gymnast Cathy Rigby flipped around the uneven bars to show how effective her Stayfree pads were, the commercial was thought to be too "graphic" by the viewing public, according to one network executive.

Now, the word "period" is allowed on tv commercials, although Harvey Dzodin, vice president, commercial clearance for ABC, says, "The first time we allowed 'period' in a commercial, it was said three times and people complained." On any major network, you will never see an entire, authentic menstrual product but only a cross section or perhaps a computer graphic or a very basic line drawing. To show napkin absorbency, ad agencies seemingly borrow from the old Bounty paper-towel commercial, except blue water is used on what looks like parts of a pad.

Douche commercials, says Kathy Oberg, N W Ayer account supervisor

for Summer's Eve, focus on the "end benefit," that the product will leave the user "fresh, clean and confident. Women don't necessarily want to hear how you get there." Kline & Co., a Fairfield, N.J.-based market-research firm, says if the $120 million douche market grows at all, it will be because of price increases stemming from inflation. The products generally don't have physicians' recommendations. Many physicians say women don't need the products and, in fact, some women may have allergic reactions.

But feminine deodorants, such as FDS spray or the Norforms suppository, will probably decline from 1986 sales of $22.5 million, says Oleh Denysyk, senior consultant at Kline. He says "bad press" has hurt the deodorants, because women feel the products may be irritating and they don't really need them.

All told, this doesn't mean the products are promoted any less. Indeed, they are promoted heavily with everything from free-standing insert (FSI) coupons to unadvertised price reductions at the stores. One thing tampon manufacturers may soon have to promote on their packages are absorbency ratings, as required by the Food & Drug Administration, which is proposing a regulation for adoption within a year. Tampon makers have never been able to reach an agreement on labeling.

Douche commercials focus on the "end benefit. Women don't necessarily want to hear how you get there."

The following are the share-leader brands in feminine-hygiene products, as broken down into sanitary napkins, tampons, douches and deodorants.

Procter & Gamble's Always was the market leader in sanitary napkins, with a 24% share as of first quarter 1987, according to data supplied by Merrill Lynch and researched by Towne-Oller, (which tracks products from warehouses to supermarkets but not drugstores). Stayfree from Johnson & Johnson had a 22% share; Kotex and New Freedom, both Kimberly-Clark products, with a 14% and 9% share, respectively; and J&J's Sure & Natural had an 8% share.

Tampax had a 56% share of the tampon market, a low estimate, notes Weber of Merrill Lynch, because convenience stores weren't included in the tally. Playtex was number two with a 30% share; J&J's o.b. brand had a 9% share; and Kotex tampons had a 4% share.

Kline & Co. reports that two companies corner the market on douches and feminine deodorants. Beecham Products' Massengill is the leader with an approximate 50% share, and C.B. Fleet's Summer's Eve has a 35% share. FDS, Alberto-Culver's feminine-hygiene spray, reigns over half the feminine-deodorant market, and Norforms from Fleet takes up 25% with its deodorized suppositories.

SANITARY NAPKINS

Always

Procter & Gamble's Always maxipads and minipads brands came out nationally in May 1984, but with the introduction of its revamped winged version for extra protection, which became available nationally in 1986, Always gradually unseated Johnson & Johnson's Stayfree products as market-share leader.

The winged product, which bears the line "Nothing beats the wings at night" at the bottom of its print advertisement, currently has three winged "Plus" napkin products that are of varying size.

In April, Always Slender for Teens went national. The thinking behind these shorter, slimmer, thin maxipads is that teenagers have different physical needs, says a spokeswoman. They also come in a drawstring polybag for teens looking for a "discreet product" for wearing and disposal. The product is

"...all I said was, 'Don't worry about Orange County. We've got it covered with our L.A. buy'."

The Orange County Register MetroGroup reaches 43% of all Orange County adults, in comparison to just 27% by the Los Angeles Times. (Source: 1987 Scarborough Newspaper Readership Study)

THE ORANGE COUNTY Register METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

being advertised in print magazines such as *Seventeen* and also on tv. Always products currently are advertised in 30-second spots, although 45-second spots also have been used. The napkins may be seen on the Friday night CBS movies and the Friday night ABC movies, as well as on *Moonlighting* and the soaps. Traditional women's magazines are used, but so are magazines such as *People, Health, Ebony* and *Essence*. Always uses FSIs in newspapers and direct-mail couponing and is a sponsor of the Publishers' Clearinghouse promotion of the Special Olympics.

LNA reports that Procter & Gamble spent $22.6 million in 1986 on Always products, $14.4 million of which was on Always Plus. Most of the dollars were on network tv and magazines. DMB&B is the agency.

Stayfree

Stayfree was the first adhesive-backed, beltless pad marketed, with the introduction of minipads in 1969. Two years later, a maxipad was made available, and in 1983, Stayfree Silhouettes came out. The hourglass-shaped napkins, which are thicker in the middle and thinner on the ends, are said to be designed to fit the "natural contours of a woman's body."

While Johnson & Johnson won't comment on their ad budgets, LNA reports that the company spent a whopping $18 million on advertising last year, compared with $14 million a year earlier. It appears that J&J pumped an additional few million into its network-tv expenditures with the introduction of its thin Silhouettes. Saatchi & Saatchi DFS Compton is the agency for Silhouettes, while Young & Rubicam handles the other Stayfree products. LNA estimates that Stayfree maxipads were supported by $71,100 last year, most of which was in cable tv, and the Stayfree maxipads called Thins had expenditures of about $3,300 in cable tv, according to LNA. The thin maxipads debuted in 1985.

A spokeswoman says the products are pitched to women between 12 and 49. Products such as thin maxipads and minipads have specific market appeal for teens.

The brand does 30-second tv spots on the soaps, game shows and prime-time shows such as the ABC Friday night movie, *Kate & Allie* and *Scarecrow & Mrs. King*. Print ads can be seen in women's books that run the gamut from *Seventeen* to *Cosmopolitan*. Free-standing inserts run in newspapers.

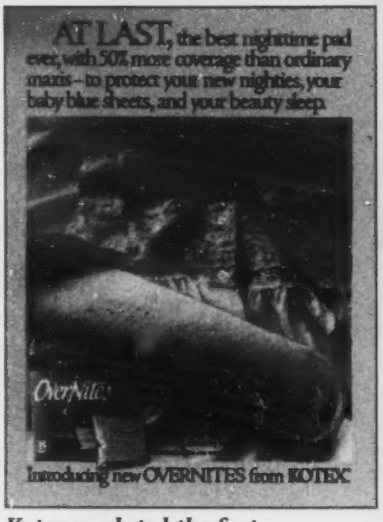
Stayfree sponsors a telethon for the Children's Miracle Network, which supports local children's hospitals. The Stayfree brand also backs Shelter Aid, a fundraising effort for victims of domestic violence.

Stayfree was the first adhesive-backed pad.

Kotex

Kimberly-Clark manufactured the "grandmother" of sanitary pads in 1920. Today's Kotex, which is differentiated from Kimberly-Clark's New Freedom by its thickness, has restaged itself with the introduction of drawstring polybags, instead of cartons, containing the folded, individually wrapped pads.

Tina Barry, director of corporate communications at Kimberly-Clark, says retailers like the change, because the bags are almost 35% smaller than the old cartons. The print campaign broke in late 1986, and tv followed early this year with both day- and prime-time shows on a wide range of programing, from the CBS Sunday night movie to *Scarecrow & Mrs. King* to the *Miss Texas Teen USA Pageant*.


AT LAST, the best nighttime pad ever, with 50% more coverage than ordinary maxis – to protect your new nighties, your baby blue sheets, and your beauty sleep.
OverNites
Introducing new OVERNITES from KOTEX

Kotex marketed the first sanitary napkin.

The print campaign is still running in women's magazines, such as *Essence* and *Seventeen*, as well as in *People* and *TV Guide*. Free-standing inserts are used for the entire Kotex line. In-store ads and Carol Wright direct-mail coupons are used as well.

New graphics embellish the packaging, but the different color schemes for easy napkin-size identification are the same. The newest size is the Kotex Profile, which is hourglass shaped and reminiscent of Stayfree Silhouettes. Kotex OverNites — with 50% more coverage than ordinary maxipads, the company says — were introduced in February 1987, and, in May, Procter & Gamble's super maxipads were renamed Always Plus Night super maxipads.

According to LNA, Kimberly-Clark spent $3.3 million in 1986 on Kotex Lightdays Pantyliners; $44,500 on Profile Maxipads; and $189,700 on Thin Maxipads. All expenditures were on magazines. Ogilvy & Mather is the agency.

New Freedom

This Kimberly-Clark product hit the market in 1972 and was intended to provide the solution of added comfort, with a thinner, narrower pad than Kotex.

New Freedom appeals to a somewhat younger audience, says K-C's Tina Barry, although the ads by Ogilvy & Mather are directed toward all

women, depending on their particular needs.

Women's books such as *Ms.* and general-interest magazines such as *TV Guide* are used although tv advertising isn't. New Freedom products also are in Carol Wright's direct-mail coupon packages and FSIs in newspapers.

LNA reports that about $2.6 million was spent on magazine advertising last year. Ogilvy & Mather handles the advertising.

Sure & Natural

These J&J-manufactured maxi-shields were launched in 1980. They are designed to provide the protection of a regular maxipad at half the bulk. Four years later, "Tiny Totes" were made for discreet carrying and disposal packs.

A spokesperson close to the account says the target audience is 12 to 34. Women's and teen books are used, including *Seventeen*, where an ad recently showed a young woman boldly dressed in white, saying, "It's the heaviest day of my period, and I'm not wearing a thick pad." Free-standing inserts are used in newspapers. Earlier this year, 30-second Sure & Natural ads appeared on the ABC Friday night movie and CBS Sunday night movie, *Murder, She Wrote*, and soaps and game shows. One ad has another woman in white pouring blue water on what appears to be a part of a Sure & Natural pad placed onto her white jacket to show the absorbency of the maxi-shields.

LNA estimates that most of Sure & Natural's $3 million in 1986 ad expenditures were in network tv. SSC&B is the agency.

TAMPONS

Tampax

Tampax was first marketed in 1936 as the "revolutionary new answer to sanitary protection," says Edwin H. Shutt, president and chief executive officer of Tambrands.

Tampax focuses on the younger half of the 12-to-50-year-old women's market. "That's when they're making their decisions on what kind of products to use," he says. "They're most receptive." About two years ago, a beginner Tampax was introduced. Petal Soft Tampax are slender, with plastic applicators rather than Tampax's traditional cardboard. Print ads may show young girls worried about bulky napkins listing reasons why they switched to Tampax, or a knowledgeable young girl in the school lavatory reassuring another not to be afraid of Tampax. Ads run in teen magazines as well as in women's books.

Tampax pitches to the teen market.

Tampax advertising is more than 50% tv, with 30-second commercials on such shows as *Cheers* and *Night Court*. One commercial features a woman lawyer at her first day in court. Prime time is an "appropriate vehicle," and Tampax has been on cable, while radio was not a successful medium, says Shutt, who couldn't explain why. Free-standing inserts in newspapers also are used. Currently, Tampax has been selling a 35-cents-off price pack.

Shutt says the tampon category is growing about 1% to 2% a year with the population. Concern over toxic-shock syndrome is "long gone," he says. "It's a rare disease, and almost no one knows anyone who had it. It's not significant in the market today." He adds that about 65% of menstruating women used tampons before toxic-shock syndrome made the news, and about the same percentage use tampons today.

About $13 million was spent on advertising in 1986, according to LNA.

YOU'VE GOT IT MADE. NOW MAKE MORE OF IT.

There's even more money to be made with U.S. Savings Bonds! Hold them for five years and earn market-based interest rates—just like money market accounts. You're guaranteed a competitive return, no matter what happens to interest rates. What's more, all the interest you'll earn is exempt from state and local income taxes. Buy U.S. Savings Bonds where you bank or work. For more information, call 1-800-US-BONDS.

U.S. SAVINGS BONDS

Bonds held less than five years earn a lower rate.

A public service of this publication.

Shutt says that's about right, and as the business grows, more is spent on advertising each year. Advertising is handled by William Esty.

Playtex

Developed in the early 1960s, Playtex tampons offered a "blooming-action design" with a plastic applicator, says Martin Petersen, director, community and government relations at Playtex. In time, a contoured tip and deodorant option were added.

While Petersen says Playtex pitches its product to all menstruating women, he notes that the company looks for tv shows that have the biggest audience of women 18 to 38. The 15-second spots currently used have been aired during *Hotel* and *Cagney & Lacey*. They also may be seen on daytime and cable tv. The ads designed by Grey are of the "snapshot approach," or flight-caption presentation, depicting women on the move.

Magazines used are only those directed to women. A half-page ad in *Cosmopolitan* shows a woman in white clothes surrounded by white cats.

Tampax peddles its products to the younger half of the 12-to-50-year-old women's market. That's when "they're most receptive."

"Mother didn't know all the facts of life," she seemingly purrs, adding that Mom thought all tampons were the same. Free-standing inserts are used in newspapers on a co-op basis. Sales promotions include bonus packs that may include 25% more product for the same price.

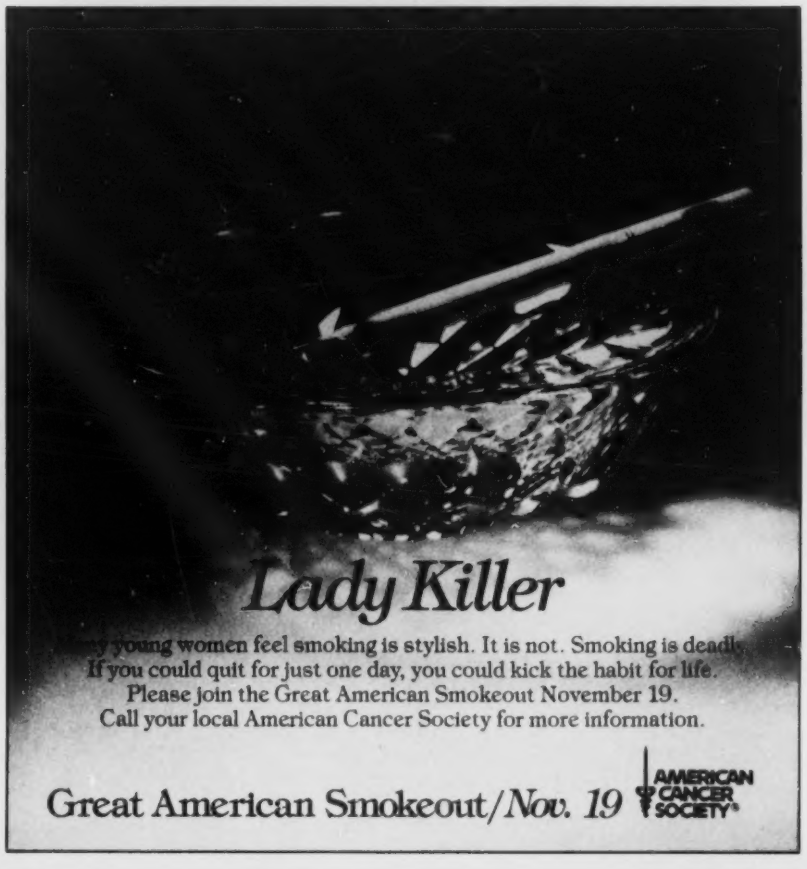
Petersen says that although concern over toxic-shock syndrome had reduced sales in 1980, the company advises women to use sanitary napkins, a product it doesn't make, when sleeping.

According to LNA, Playtex spent $7.1 million on its tampons in 1986.

o.b.

Johnson & Johnson enlisted the aid of a woman gynecologist to pitch these tampons when they were developed in 1976 in Germany. They are rolled in layers and don't have any applicators. A 30-second tv spot instructs trendy-looking young women to "set yourself free from the extras." The commercial employs a simple line drawing to show the layered-design tampon. The spots were seen earlier this year on soaps and game shows. FSIs are used in newspapers. The tampon also is advertised in magazines, including *Cosmopolitan* and *Glamour*.

LNA reports that ad expenditures were $3.2 million in 1986. Dollars were put into magazines first with the rest in network tv, and, to a lesser extent, spot tv. Cadwell Davis Partners is the agency.


Lady Killer
young women feel smoking is stylish. It is not. Smoking is deadly.
If you could quit for just one day, you could kick the habit for life.
Please join the Great American Smokeout November 19.
Call your local American Cancer Society for more information.
Great American Smokeout/Nov. 19
AMERICAN CANCER SOCIETY

Kotex

Kotex tampons were introduced in 1960. They also are being restaged in the same package graphics as the Kotex napkins, points out Kimberly-Clark's Tina Barry. The tampons continue to be contained in cartons, but now they have flip tops.

Kotex tampons originally had stick applicators, and these are still available. But now they also offer plastic-tube applicators.

Women's books as well as *People* are used. A recent ad in *Redbook* had a summer theme presenting a tampon protective enough to wear with your bathing suit. Tv ads also may be found on *Scarecrow & Mrs. King* and the CBS Sunday night movie. FSIs are used in Sunday newspapers. Ogilvy & Mather handles the advertising.

LNA didn't break out figures for Kotex tampons.

DOUCHES

Massengill

This 75-year-old douche brand covers the feminine-deodorant market with a 50% market share. It went disposable

According to
Scarborough's 1987 Newspaper
Audience Ratings Study:

73% of Columbus, Ohio . . .

MSA adults are covered by *The Sunday Dispatch* and 55% daily.

This means your advertising reaches more and more of the nearly 1,000,000 Columbus MSA adults.

Coverage in MSA	Total in Market	Percent Weekday	Reading Each Sunday
Employed	624,100	56	78
Working women	275,200	52	77
College graduates	170,500	68	84
Household income $35,000 up	344,900	60	86

Call National Advertising Manager Leonard Zane for more information and advertising assistance at (614) 461-5183; in Ohio toll free 1-800-282-0263.

The Columbus Dispatch

Morning & Sunday

Represented nationally by Cresmer, Woodward, O'Mara & Ormsbee, Inc. and Metropolitan Sunday Newspapers, Inc.

Source: Scarborough's 1987 Newspaper Audience Rating Study

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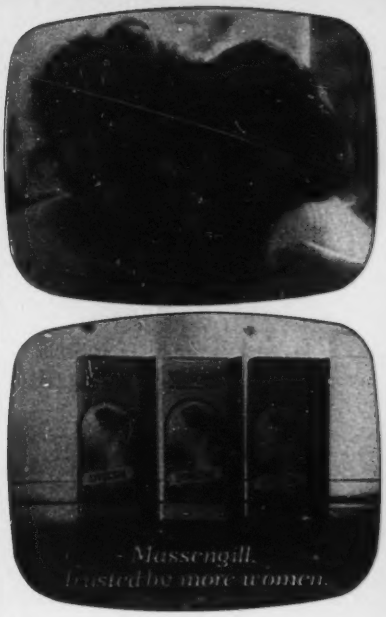

Massengill has a 50% share of the douche market.

in 1973, a year after Summer's Eve, which has a 35% share.

Beecham Products says it markets Massengill to all women, or more likely all menstruating women. Tv ads are in 30-second spots. Spot tv is often used to reach the growing Hispanic market, says a spokeswoman. Earlier this year, a heavy prime-time schedule included network movies, *Simon & Simon* and *Stingray* and also daytime soaps and game shows. Massengill also advertises in trade publications such as *Ob. Gyn. News*.

Major women's magazines also are used, as well as free-standing inserts, in-pack and on-pack couponing. Other promotions are sampling programs with gynecologists.

Massengill's products range from medicated and extra-mild vinegar-and-water douches to belle-mai (which is a baby-powder fragrance) and even mountain herbs and country flowers.

In 1986, LNA says that Massengill's $2.6 million in ad dollars were strictly in network tv, with a very small amount in spot. Grey is the agency.

Summer's Eve

The first disposable douche was actually a Fleet enema bottle with an attached probe. C.B. Fleet began marketing Summer's Eve in 1972 and advertised the product in women's

Give five.

What you get back is immeasurable.

Just five hours a week. Just 5% of your income. It's not much to give, to the causes you really care about. But that small investment could change somebody's life. And it's hard to imagine a better return than that.

INDEPENDENT SECTOR

Ad Council

books primarily until tv commercials were allowed.

Now, the $7 million to $8 million in ad dollars are showered on :15s and :30s on tv and aired in a schedule of "heavy" daytime, "good" prime time and most of cable (including the Nashville Network and Black Entertainment Television). Summer's Eve skews to a younger audience of women, 18 to 34. Print is used occasionally "when there is something we can't say on tv," explains Brian Duffy, president. He points out that tv is "still fairly restrictive. We try to present in good taste, but certain words are no-nos."

Summer's Eve also is promoted in two FSIs yearly. About two years ago, *Woman's Body, An Owner's Manual*, a 400-page book, was put out by Summer's Eve. There also has been personalized writing paper available in any of the colors in the Summer's Eve packaging. Their mixes are vinegar and water; medicated; post-menstrual; and fragrances of white flower, musk and herbs.

Summer's Eve has introduced a new "feminine wash," an external non-soap cleanser. The product has been advertised on tv this summer in daytime and prime-time slots, and also on cable tv and in women's books. Fleet will be dropping 47 million FSIs with 50-cent coupons nationally this month. More than four million samples are "floating around" in Summer's Eve twin packs that also contain coupons. They also will be marketing a two-ounce sample at the beginning of the year.

N W Ayer is the agency since it acquired Cunningham & Walsh, which had been Summer's Eve's agency since its inception. Ted Colangelo Associates, a Greenwich, Conn.-based division of DMB&B, does the sales promotion work.

DEODORANTS

FDS

FDS, a feminine spray deodorant by Alberto-Culver, came out in 1966 to "make women more confident in themselves," says the company.

Packaging of the spray, which comes in scents like baby powder and an extra-strength form, warns women that temperature, hormonal changes and stress make a body produce odors.

The 15-second tv ads of FDS earlier this year appeared only on daytime soaps and game shows on CBS and NBC. Print ads run solely in women's magazines. A recent ad in *Seventeen* also offered a free sample by mail.

LNA reports that last year about $2 million was spent on network tv first, with lesser amounts on cable tv, magazines and spot tv.

***FDS runs a free-sample ad in* Seventeen.**

Norforms

This vaginal-deodorant suppository has been around since the 1930s. More recently, C.B. Fleet purchased it from Procter & Gamble.

Norforms's ad budget is about $1 million. "It is an older product that has a smaller user base," explains Fleet president Brian Duffy. "We can maintain it with that kind of budgeting."

Advertising is strictly during daytime tv and on cable. The suppository may be advertised in 10-second spots at the end of game shows and in :15's on soap operas and game shows.

Norforms' agency was Cunningham & Walsh, but they recently switched to Earle Bower Associates, because "we thought [it] could do a better job as a smaller agency," says Duffy. Bower was the original account supervisor for Summer's Eve. Ted Colangelo Associates handles sales promotion.

LNA says Norforms had $725,000 in tv-ad expenditures last year. ■

ECONOMIC EYE

PAPERS PICK UP

The Newspaper Advertising Bureau reports ad expenditures hopped 10.2% for the first half of 1987. This is a considerable improvement on early projections. The gains break down as follows: retail, +8.1% to $7.1 billion; classified up a whopping 16.0% to $5.3 billion; and national up 3.0% to $1.8 million.

MAGAZINE AD SCORECARD

	Ad Pages Aug. 1987	% change from Aug. 1986	Dollars spent (000)	% change from Aug. 1986
1. Skin Care, Creams, Lotions and Oils	124.21	+45.9%	$ 4,000.9	+95.9%
2. Lip and Eye Beauty Products	84.33	+56.7	3,171.8	+77.4
3. Scents and Fragrances	103.44	−10.9	3,098.6	−4.9
4. Facial Makeup Products	52.31	+13.0	2,066.2	+20.9
5. Prepared Dinners and Entrees (including Pizza)	27.77	+42.3	1,847.0	+67.5
6. Liquor	270.33	+5.5	11,244.5	+9.6
7. Cigarettes	616.56	+18.0	32,628.4	+11.6
8. Soaps and Detergents	68.44	+27.8	4,065.0	+21.1
9. Passenger Cars, Domestic	241.99	+99.9	12,119.8	+97.3
10. Passenger Cars, Imported	421.61	+87.6	15,629.3	+34.7

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100 ← 1986 → ← 1987 →

	Nov.	% change	Dec.	% change	Jan.	% change	Feb.	% change	Mar.	% change	Apr.	% change	May	% change	June	% change
Network TV																
Daytime	98	−2	85	−15	92	−9	86	−9	88	−8	92	−6	92	−6	95	−1
Nighttime	107	+7	109	+9	106	+0	105	+8	112	+7	99	+8	110	+6	112	+3
Spot TV																
Prime time	115	+15	116	+16	129	+7	133	+11	131	+13	–	–	–	–	–	–
Daytime	111	+11	105	+5	130	+5	108	−0	108	−0	–	–	–	–	–	–
Network radio	106	+6	101	+1	139	+14	130	+12	126	+11	116	+4	116	+2	114	−1
Spot radio	103	+3	←	→	←		101	+1	→		←		98	+3	→	
Consumer magazines	106	+6	107	+7	109	+4	109	+3	110	+4	109	+3	109	+3	109	+3
Natl. Sunday mags	94	−6	94	−6	103	+11	103	+11	103	+11	103	+11	103	+11	103	+7
Business publications	107	+7	107	+7	111	+5	111	+5	111	+5	111	+5	111	+5	111	+5
Newspapers	109	+9	109	+9	116	+8	116	+8	116	+8	116	+8	116	+8	116	+7
Outdoor	106	+6	106	+6	111	+6	111	+6	111	+6	114	+6	114	+6	114	+6

Notes: Percentage shown is relative change from the same month/period the year before.

1985 = 100

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.

ASSESSING SINGLE-SOURCE

THE DOUBLE PLAY

Since the early 1960s when Norton Garfinkle gave birth to his Brand Rating Index, advertisers have increasingly relied upon "memory-based" syndicated sources to tell them what people were watching on television and buying at the supermarket. Today, however, changes in the marketing and media environment are fast making many of the old ways of thinking obsolete.

Fortunately, advertisers no longer need to rely on the consumers' faulty memory relative to what they said they looked at or purchased.

New "electronic" single-source data help us examine objectively the critical relationship between advertising/sales promotion and the actual sales at the cash register. It gets at the real reason why advertisers advertise.

Single-source data provides advertisers with new leverage in the marketplace. It can help them:

- Understand how ad delivery can influence consumer response.
- Understand the relationship between a brand's advertising exposure level and its sales or share level.
- Identify specific windows of opportunity that will make advertising work more productively.
- Develop low-risk strategies to maximize sales through more selective television buying.

In a nutshell, single-source data can move us from "cost per 1,000 warm bodies" to the more relevant measure of advertising impact — "sales response per 1,000 ad exposures."

In the past, scanner data have focused marketers' attention largely on the short-term gains derived from sales promotion. However, single-source data has double-edged potential. It can also help us to study the effects of longer-term brand-building advertising and media strategies.

Of course, what I'm talking about is change . . . and change is very disorienting. We need to rock our own boats and take a major push forward. Single-source data can help us do that.

Every marketer seeks to improve his advertising productivity and secure better measures of advertising effectiveness. This need has taken on a new urgency with rising promotion spending, a growing focus on local and regional advertising strategies, clutter, zapping and the jolting increases in network-television prices for 1987-88. An investment in single-source research can be a sound insurance policy that pays off in the marketplace.

Advertisers have traditionally looked to their agencies for strong counsel and guidance in all aspects of the advertising planning process. Today, however, the growth of single-source data has been largely client driven. Agencies had better move quickly into a leadership role in the use of single-source data by training staff in its use, developing programs to analyze the information and using their media planning and marketing-research operations to evaluate findings.

I am sure that all of us are familiar with the wisdom of that great financial marketing genius Willie Sutton, who when asked why he robbed banks replied, "That's where the money is!"

Why should advertisers seek out single-source media and product-purchase data? Because that's where the important answers may be!

Ron Kaatz is Associate Professor of Advertising at Northwestern University's Medill School of Journalism.

OUR READERS TELL US . . .

Research USA in Chicago polled a sampling of appropriate readers on the prospects for single-source research. It's obvious that, for them, the value of this concept is still to be determined. (Base = 114 unless otherwise specified.)

1. Single-source data is currently being used as a test-marketing tool but is being developed as a national tv-measurement system that incorporates a household's tv viewing into their product purchasing. How reliable do you think the results of single-source data are?

Very reliable	10.5%
Somewhat reliable	55.3%
Somewhat unreliable	30.7%
Very unreliable	3.5%
Other	

2. How is single-source data most valuable? (Check all answers that seem to apply)

Defining target audiences for marketers	58.8%
Copy and product acceptance in test marketing	43.9%
As a solution to respondent bias in the diaries or forgetting	21.9%
Defining the optimum television weight and scheduling for UPC-coded products	29.8%
Other	11.4%
No answer	2.6%

WALK, DON'T RUN

While I want to believe that an electronic data base that merges media habits with brand-purchase information will improve media planners' ability to "rifle" our target user group, I am *very* concerned that we may be rushing to greet this new child of technology without first giving sufficient thought to its limitations.

Rather than implying that the problems/limitations can be traced to deficiencies in the present system, I suggest we focus on a point in the future when all of the technical problems have been resolved. In this way, we can get a clearer picture of the role that single source *could* play in our media planning/execution process.

Assuming for the moment that a nationally projectable, single-panel, all-media, all-purchase, continuous data bank was available today in all of its glory, I would offer the following as a realistic appraisal of what we can and *cannot* expect the system to provide.

It can:

- Help us to better align our media target with the target group as identified in the brand's marketing plan.
- Tighten our media planning and buying target definition, thereby enabling us to minimize coverage of non-prospect groups.
- Give us a "measure" of sales/advertising responsiveness under controlled test-market conditions.

It can't:

- Provide us with a picture of the net effect (purchase-decision influence) of the other brand-marketing variables, i.e., price adjustments, distribution shifts, product modifications.
- Account for the marketing-mix impact of the competition, including all of the areas outlined above, plus changes in advertising pressure/spending levels.
- Provide us with a targeting tool for those many instances when demographic data must still be employed as the common denominator. These include, but are not limited to, such instances as when a brand, a) is "breaking" new category ground; b) has a highly concentrated user base or ranks low in the category (either situation could result in the data not being sufficiently stable for further statistical analysis); or c) chooses to target a non-user group for potential conversion to the brand/category.

If your "take-away" at this point is that I'm opposed to the use of single source as a media planning/buying tool, you've misread my intent.

What I am suggesting instead is a carefully thought-out, prudent approach to use of the data in the context of *all* of the factors that contribute to the consumer's purchase decision. And to this end, I propose the following three adjustments:

Rather than utilizing brand level data, I would suggest instead that we consider collapsing the information into product category totals. Second, we need to maintain a base of user demographic-profile information. And finally, we must develop theories/constructs. All of this is but an exercise in advanced numbers manipulation unless at the same time we work to develop the underlying communication theories and marketing constructs against which to measure the contribution of the advertising in generating the final sale.

Stephen P. Phelps is a senior vice president, deputy director of media services at D'Arcy Masius Benton & Bowles in St. Louis.

3. Do you feel single-source data will be trendable and projectable?

Yes	69.3%
No	27.2%
No answer	3.5%

4. Do you think ScanAmerica's sample of 10,000 households will be large enough after it is divided by 500 product-purchasing groups?

Yes	40.4%
No	55.2%
No answer	4.4%

5. Do you think this will create new network-tv advertising categories?

Yes	16.7%
No	74.6%
No answer	8.7%

6. Are you thinking of incorporating single-source data into your media buying?

Yes	36.8%
No	57.1%
No answer	6.1%

If "Yes," how would you use it?

Complementary device to other research	88.1%
Sole research tool	9.5%
Other	2.4%
(Base = 42)	

7. Do you think single-source data will change the structure of the marketing and media departments?

Yes	30.7%
No	65.8%
No answer	3.5%